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## Water Quality Planning Bureau

# EQuIS Data Processor Guidance Manual

Data Management Section Water Quality Planning Bureau Water Quality Division

April 2019

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Document History			
Revision #	<b>Revision Date</b>	Revised By	Notes
1.0	1/6/2010	Jolene McQuillan	Initial document development
1.1	4/3/2014	Jolene McQuillan	Added clarification to Section 3.7 about submitting
1.2	5/15/2018	Jolene McQuillan	Updated DEQ logo
2.0	April 2019	Jolene McQuillan	Reviewed and updated entire document as needed to reflect any version/process changes.

Acronyms			
File	.txt	Text File	
Extensions	.xls	Excel Spreadsheet	
	.zip	Compressed File	
Acronyms	DEQ	Montana Department of Environmental Quality	
	EDD	Electronic Data Deliverable	
	EDP	EQuIS Data Processor	
	MT-eWQX	Montana EQuIS Water Quality Exchange	
	WQX	Water Quality Exchange	

## **1.0 EQuIS Data Processor Overview**

The purpose of this guidance manual is to provide instructions on how to use the EQuIS Data Processor (EDP). The EDP is a standalone application that <u>must</u> be used by data providers to check their electronic data deliverable (EDD) files prior to submission to our Montana EQuIS WQX database (MT-eWQX). The EDP performs a series of formatting checks on the EDD and then identifies any records that have errors. The EDP checks data for the following:

- Required Fields
- Field Length
- Data Types
- Valid Reference Values
- Duplicate Rows
- Range Checking
- Record Parent-Child Relationships

If errors are detected, the application allows the data provider to correct the errors directly in the EDP. After all errors have been corrected, the EDP must be re-run to ensure that no errors remain. EDD files that pass through the EDP error-free should also result in an error-free import into the MT-eWQX database, as long as the EDD submittal process is followed. The EDP does not compare the data in the EDD to the data in the MT-eWQX database, so it is possible to receive an error when submitting to MT-eWQX if the data in your EDD does not relate to data in the database.

All MT-eWQX materials referenced in this guidance manual are available from DEQ's MT-eWQX Support website located at <u>http://deq.mt.gov/water/surfacewater/SubmitData</u>.

## 2.0 EDP Installation

To use the EDP application, the following four steps must be completed in the order shown:

- 1. Download and install the EDP application
- 2. Download the Montana DEQ Format
- 3. Download the Montana DEQ Reference Values
- 4. Register the EDP Application

#### 2.1 Download and Install the EDP Application

The download page for the EDP application and associated files can be accessed from the MT-eWQX Support website: <u>http://deq.mt.gov/water/surfacewater/SubmitData</u>. By clicking the 'Download EDP' link under Step 2, you'll be directed to the EDP download page, hosted by EarthSoft, the developer of the EDP and the MT-eWQX database.

NOTE: These instructions may vary depending on the web browser used and individual computer settings.

From the EDP Download page (https://earthsoft.com/products/edp/edp-format-for-mtdeg/):

- 1. Click the correct EDP download link, either '32 bit (x86)' or '64 bit (x64)'.
  - a. To determine if your computer requires x32 or x64 bit, open your Start menu, right-click on 'Computer', and select 'Properties'. The system type should indicate is it's a 32 or 64-bit operating system.



Montana DEQ Format (ZIP)

#### Montana DEQ Reference Values (.zip)

2. <u>Select 'Save as' when asked what to do with the file.</u>



3. Browse to the location you want to save the zip file, and select "Save".

🥔 Save As	
🚱 💭 🗣 🖡 🕨 McQuillan, Jolene 🕨	Downloads
Organize  New folder	iii - 🔞
Favorites     Favorites     Desktop     Downloads     Recent Places	Date modified Type No items match your search.
Concluse  Concluse Concluse Concluse  Concluse  Concluse  Concluse  Concluse  Concluse Concluse Concluse Concluse Concluse Concluse Concluse Concluse Concluse Concluse Conclus	
Videos 🗸 🗸	III F
File name: EDP_6.5.0_x64	•
Save as type: Compressed (zip	pped) Folder
Hide Folders	Save Cancel

4. Locate the downloaded .zip file, right-click on the file, select 'Properties', and click 'Unblock' if it's available. Select 'OK' to exit the file properties window.

🚯 EDP_6.5.0_x64 Properties 🛛 💦			
General Secur	ty Details Previous Versions		
1	EDP_6.5.0_x64		
Type of file:	Compressed (zipped) Folder (.zip)		
Opens with:	Windows Explorer Change		
Location:	C:\Users\cb0169\Desktop		
Size:	35.4 MB (37,148,187 bytes)		
Size on disk:	35.4 MB (37,150,720 bytes)		
Created:	Today, March 27, 2019, 1 minute ago		
Modified:	Today, March 27, 2019, 10:47:32 AM		
Accessed:	Today, March 27, 2019, 1 minute ago		
Attributes:	Read-only Hidden Advanced		
Security:	This file came from another computer and might be blocked to help protect this computer.		
	OK Cancel Apply		

5. Right-click on the zip file and select 'Extract All'. Save the files to a location on your computer.



7. The installation wizard will launch. Click the 'Next' button.

EOUIS	Welcome to the EarthSoft EQuIS EDP Standalone Setup Wizard		
Bound	The Setup Wizard will install EarthSoft EQuIS EDP Standalone on your computer. Click Next to continue or Cancel to exit the Setup Wizard.		
earths@ft			
	Back Next Cancel		

8. The License Agreement screen will appear. Select the 'I accept the license agreement' check-box and click 'Next'.



9. Select 'Next', no changes are needed on this Custom Setup screen.

🔂 EarthSoft EQuIS EDP Standalone Setup	
Custom Setup Select the way you want features to be installed.	earths@ft
Click the icons in the tree below to change the way fe	atures will be installed.
EQUIS Data Processor     Application Files     Help Files	EarthSoft EQuIS Data Processor
	This feature requires 1993KB on your hard drive. It has 2 of 2 subfeatures selected. The subfeatures require 32MB on your hard drive.
Location: C:\Program Files\EarthSoft\EDP\	Browse
Reset Disk Usage	Back Next Cancel

10. Select 'Install'.

-	🔂 EarthSoft EQuIS EDP Standald	one Setup	- • ×
	Ready to install EarthSoft	EQuIS EDP Standalone	earths@ft
	Click Install to begin the installa settings. Click Cancel to exit the	tion. Click Back to review or change wizard.	any of your installation
		Back Inst	all Cancel
11.	After the install run	s, select 'Finish'.	_ • ×
	EQUIS	Completed the EarthSc Standalone Setup Wizz Click the Finish button to exit the Se	oft EQuIS EDP ard tup Wizard.



#### **2.2 Download the Montana DEQ Format**

From the EDP Download page (<u>https://earthsoft.com/products/edp/edp-format-for-mtdeq/</u>):

- 1. Click the 'Montana DEQ Format (EXE)' link to start the download.
  - a. **NOTE:** If you have trouble downloading the .exe version of the format, see the steps in section 2.2.1 for downloading the .zip version.

2. <u>Select 'Run' when prompted.</u>

Do you want to run or save MTDEQ_WQX_Format_20170316.exe (628 KB) from download.earthsoft.com?	Do you want to run or save MTDEQ_WQX_Format_20170316.exe (628 KB) from do	ownload.earthsoft.com?
--	---	------------------------

Run Save 🔻 Cancel

×

3. The following window should appear. Verify the format will be installed to C:\Program Files\EarthSoft\EQuIS\Formats\MTDEQ. Select `Unzip' to complete the download.

winzip sen-extractor - windeq_wc	ZV_LOUUIAL_2011	OSTO'EXE
To unzip all files in this self-extractor file folder press the Unzip button.	e to the specified	Unzip
Unzip to folder: s\EarthSoft\EQuIS\Formats\MTDEQ	Browse	Run WinZip Close
Verwrite files without prompting		About
		Help

4. If successful, this message should appear. Select 'OK' and move on to section 2.3 WinZip Self-Extractor



#### 2.2.1 Download Montana DEQ Format (ZIP Format)

If you have trouble downloading the .exe version of the format, download the .zip version of the format. 1. Click the 'Montana DEQ Format (ZIP)' link to start the download.



Montana DEQ Reference Values (.zip)

2. Select 'Save as' when asked what to do with the file.

Internet Explorer	×
What do you want to do with MTDEQ_WQX_Format_20170316.zip? Size: 492 KB From: download.earthsoft.com	
Open The file won't be saved automatically.	
→ Save	
→ Save as	
•	Cancel

3. Browse to the location you want to save the zip file, and select "Save".

😂 Save As			×
🕒 🕞 🗢 🔳 Desktop	p >	Search Desktop	Q
Organize • New	folder		0
Favorites     Favorites     Desktop     Downloads     Recent Places     OneDrive	System Folder  MCQuillan, Jolene System Folder		A E
<ul> <li>∠ Elibraries</li> <li>&gt; Bocuments</li> <li>&gt; Music</li> <li>&gt; Pictures</li> <li>&gt; Videos</li> </ul>	Computer System Folder Network System Folder		
File name: Save as type:	MTDEQ_WQX_Format_20170316.zip Compressed (zipped) Folder (*.zip)		•
Hide Folders	$\rightarrow$	Save Canc	el

4. Locate the downloaded .zip file, right-click on the file, select 'Properties', and click 'Unblock' if it's available. Select 'OK' to exit the file properties window.

🐌 MTDEQ_WQ>	K_Format_20170316.zip Properties
General Secur	ity Details Previous Versions
1	MTDEQ_WQX_Format_20170316.zip
Type of file:	Compressed (zipped) Folder (.zip)
Opens with:	😭 Windows Explorer Change
Location:	C:\Users\cb0169\Desktop
Size:	492 KB (503,876 bytes)
Size on disk:	496 KB (507,904 bytes)
Created:	Today, March 27, 2019, 2:32:05 PM
Modified:	Today, March 27, 2019, 2:32:39 PM
Accessed:	Today, March 27, 2019, 2:32:39 PM
Attributes:	Read-only Hidden Advanced
Security:	This file came from another computer and might be blocked to help protect this computer.
	OK Cancel Apply

 Right-click on the zip file and select 'Extract All'. Browse to the following location: C:\Program Files\EarthSoft\EDP\Formats. (NOTE: To better organize your format files, create a new folder under Formats called MTDEQ and save your files there.) Select 'OK' to extract the files to that new folder.

🕞 📙 Extract Com	pressed (Zipped) Folders
Select a Dest	Select a destination
Files will be extra	Select the place where you want to extract the selected item(s click the OK button.
C:\Users\cb0169	DisplayLink Core Software
Show extracte	DVD Maker      EarthSoft
	▲ LEDP
	les
	Formats
	⊳ 🥾 EarthSoft 📜 fr
	L Help
	To view subfolders, click the symbol next to a folder.
	Make New Folder

#### 2.3 Download the Montana DEQ Reference Values (if needed)

This download is only required if the modified date for the Montana DEQ Reference Values file is newer than the format download modified date. The reference value file is included in the format download, but a newer version of the file may be available if numerous new reference values have been added.

From the EDP Download page (<u>https://earthsoft.com/products/edp/edp-format-for-mtdeq/</u>):

- 1. Click the 'Montana DEQ Reference Values (.zip)' link to start the download.
  - EDP Version 6.5 32 bit (x86) | 64 bit (x64) Montana DEQ Format (EXE) Montana DEQ Format (ZIP) Montana DEQ Reference Values (.zip)
  - 2. Select 'Save as' when asked what to do with the file.



3. Browse to the location you want to save the zip file, and select "Save".

😂 Save As		
🕒 💭 🖛 🔳 Deskt	op 🕨	- + Search Desktop
Organize 👻 Ne	w folder	
<ul> <li>Favorites</li> <li>Desktop</li> <li>Downloads</li> <li>Recent Places</li> <li>OneDrive</li> </ul>	E Libraries System Folder McQuillan, Jolene System Folder	<b>▲</b>
<ul> <li>▲ Libraries</li> <li>▶ ③ Documents</li> <li>▶ ▲ Music</li> <li>▶ ● Pictures</li> <li>▶ ● Videos</li> </ul>	Computer System Folder Network System Folder	
File name: Save as type:	MTDEQ_WQX_RVF.zip Compressed (zipped) Folder (*.zip)	•
Hide Folders		Save Cancel

4. Locate the downloaded .zip file, right-click on the file, select 'Properties', and click 'Unblock' if it's available. Select 'OK' to exit the file properties window.

🗼 MTDEQ_WQ>	<_RVF.zip Properties	6
General Securi	ity Details Previous Versions	_
1	MTDEQ_WQX_RVF.zip	
Type of file:	Compressed (zipped) Folder (.zip)	
Opens with:	😭 Windows Explorer Change	
Location:	C:\Users\cb0169\Desktop	
Size:	291 KB (298.165 bytes)	
Size on disk:	292 KB (299,008 bytes)	
Created:	Today, March 27, 2019, 3:05:01 PM	
Modified:	Today, March 27, 2019, 3:05:01 PM	
Accessed:	Today, March 27, 2019, 3:05:01 PM	
Attributes:	Read-only Hidden Advanced	
Security:	This file came from another computer and might be blocked to help protect this computer.	
<u></u>	OK Cancel Apply	

5. Right-click on the zip file and select `Extract All'. Browse to the folder on your C drive where the MTDEQ format files are saved (such as C:\Program Files\EarthSoft\EDP\Formats\MTDEQ). Select `Extract'. Select `Copy and Replace' to update the format's reference value file with the newly downloaded version.



#### 2.4 Register the EDP Application

Once downloaded and installed, the EDP application and Montana DEQ format must be registered.

- 1. Open the EDP application by selecting Start $\rightarrow$ All Programs $\rightarrow$ EarthSoft $\rightarrow$ EQuIS EDP Standalone.
  - 🐌 Dell Display Manager 🐌 EarthSoft EQuIS EDP Standalone 32bit 📴 EQuIS EDP Standalone 🔫 Games l Maintenance Microsoft Office 2016 Tools L Microsoft Silverlight 📙 Microsoft System Center 👢 Path Copy Copy RSA 👢 Snagit 10 ◀ Back Search programs and files Q
  - 2. The EDP application will start and a blank screen will appear. Select 'Format' from the menu.



3. Browse to the folder where the format files were saved in Section 2.2 (C:\Program Files\EarthSoft\EQuIS\Formats\MTDEQ. Select the 'MTDEQ\_WQX.xse' file and click 'Open'.

Jelect i offiat file						
🕒 💭 🗣 📕 « Program Files 🕨 Ear	rthSof	t ► EQuIS ► Formats ► I	MTDEQ 👻	<b>↓</b> Search	MTDEQ	Q
Organize • New folder				E	- 1	0
4 👢 Program Files	*	Name		Date modifi	ied	Туре
D L 7-Zip		MTDEQ_WQX.xse		3/16/2017 4	4:51 PM	XSE File
Image: A common Files						
> 👢 DellTPad	-					
DIFX						
DisplayLink Core Software	=					
DVD Maker						
4 👢 EarthSoft						
D 👢 EDP						
4 👢 EQuIS						
4 🗼 Formats						
🐌 IEMB_EDD						
🗼 MTDEQ						
> 🗼 Intel						
Internet Explorer						
Microsoft Office 15						
Microsoft Policy Platform	-	•	Ш			÷.
Cite annual Citera			_	Course Cilor	/9	
File name:				Format Files	(*, (D2X.*)	ise; •.zi ▼
			$\rightarrow$	Open		Cancel

4. The EDP Registration Screen appears. Click the 'Register' button.

MTDEQ_WQX Not found on this computer
By clicking on 'Next' or 'Register' below, you accept the following liability
Until registered by purchasing a registration key, this software is an evaluation license only. As such, the entire risk as to the results of performance of the software is assumed by you. Neither EarthSoft, Inc. nor anyone else who has been involved in the creation, production, or delivery of this product shall be liable for any direct, indirect, consequential, or incidental damages (including damages or loss of business profits, business interruption, loss of business information, and the like) arising out of the use of or inability to use such product even if EarthSoft, Inc. has
To obtain an evaluation key, visit:
http://www.earthsoft.com/en/support/evaluate.asp
Register Next > Cancel

5. In the Software Registration window, select the 'Workstation Licenses' tab and then click the link directly under the New Key Codes box.

8	Software	e Registration		x
Review C:\	registration status of ProgramData\EarthSoft\E	products curren QuIS.exe.config	ntly ins	stalled on this co
Activation	Workstation Licenses N	letwork Licenses	SPLA	
•		Ш		•
	Maintenance key	not found		
Compu	ter ID: 133785310			
New Key	Codes: Click <u>here</u> to reques Click <u>here</u> to reque	st registration key est maintenance	/ for thi extensi	Save Key(s) s computer o
			OK	Cancel

6. An internet window will open and the 'EDP Format for MTDEQ – Registration' website will appear. Enter the requested information and select 'Submit'. The Computer ID field should automatically be populated. The registration keys you will receive are associated with your Computer ID, so if you change computers you'll need to download and install EDP again and request new keys.



7. After the registration form is submitted, you should receive a confirmation email indicating your request of being processed. Keys will be sent to the email address provided in the form typically within 48 hours. If the form is submitted during typical business hours, keys should be received within a couple hours.

	🗏 EQuIS Data Processor (EDP) Registration Keys - Message (Plain Text)	]
	Elle Edit View Insert Format Iools Actions Help Adobe PDF	l
L	🖓 Reply   🍣 Reply to All   🙈 Forward 🗈   😼   🚩   🍅   🎦 🗙   🔺 - 🗇 - A*   🕘 💂	Ľ,
	From: McQuillan, Jolene on behalf of DEQ MTeWQX Sent: Mon 10/12/2009 4:18 PM	ľ
	To: McQuillan, Jolene	ŧ
	cc: Subject: EQuIS Data Processor (EDP) Registration Keys	
	Dear Jolene McQuillan (jmcquillan@mt.gov},	5
	Thank you for registering the Montana DEQ Format for EDP. Please paste the following registration keys into the application's	r
	registration window.	þ
	BVVVB-5L9UE-RPFJ9-VBR15 B8VOE-930DE-R861D-24RA5	F
	If you have problems or questions, visit DEQ's MT-eWQX Support webpage at <a href="http://deq.mt.gov/wqinfo/datamgmt/MTEWQX.asp">http://deq.mt.gov/wqinfo/datamgmt/MTEWQX.asp</a> or contact us at DEQMTeWQX@mt.gov.	R
	Thank you.	

8. Copy the keys from the email and paste them into the 'New Key Codes' field on the registration window. If you closed out of EDP while waiting for the keys to arrive, follow steps 1-5 above to return to the registration window.

<b>1</b>	Software Registration	x
Reviev C:\	v registration status of products currently installed on thi ProgramData\EarthSoft\EQuIS.exe.config	s co
Activation	Workstation Licenses Network Licenses SPLA	
•	Maintenance key not found	•
	Maintenance key not round	
Compu	uter ID: 133785310	
New Key	Codes: R4F7-EACKE-J6O2U-VRM0A Save Key(s)	
•	Click <u>here</u> to request registration key for this computer Click <u>here</u> to request maintenance extensio	
	OK	el

- 9. After the keys have been entered, select 'Save Key(s)'. A screen stating that the registration succeeded should appear, select 'Ok'.
- 10. The EDP and Montana DEQ format is now registered and ready to use. To start using EDP, select 'Format' from the menu, browse to the folder where the format files were saved in Section 2.2 (C:\Program Files\EarthSoft\EQuIS\Formats\MTDEQ), and select the 'MTDEQ\_WQX.xse' file.

## 3.0 Using the EDP

To start the EDP application, select Start  $\rightarrow$  All Programs  $\rightarrow$  EarthSoft  $\rightarrow$  EQuIS EDP Standalone from the Windows 'Start' menu. You should see a tab at the bottom of the screen named 'MTDEQ\_WQX'.

		EQuIS Data Processor	_ = X
Home			0
Format EDD Error Sum Log Open Error Log	Image: Second	mn(s) Chooser Chooser Set as Comment Row Data	Image: Brind →     Image: Brind →     Image: Brind →     Image: Brind →       Image: Brind →     Image: Brind →     Image: Brind →     Image: Brind →       Image: Brind →     Image: Brind →     Image: Brind →     Image: Brind →       Image: Brind →     Image: Brind →     Image: Brind →     Image: Brind →       Image: Brind →     Image: Brind →     Image: Brind →     Image: Brind →       Image: Brind →     Image: Brind →     Image: Brind →     Image: Brind →       Image: Brind →     Image: Brind →     Image: Brind →     Image: Brind →       Image: Brind →     Image: Brind →     Image: Brind →     Image: Brind →       Image: Brind →     Image: Brind →     Image: Brind →     Image: Brind →       Image: Brind →     Image: Brind →     Image: Brind →     Image: Brind →       Image: Brind →     Image: Brind →     Image: Brind →     Image: Brind →       Image: Brind →     Image: Brind →     Image: Brind →     Image: Brind →       Image: Brind →     Image: Brind →     Image: Brind →     Image: Brind →       Image: Brind →     Image: Brind →     Image: Brind →     Image: Brind →       Image: Brind →     Image: Brind →     Image: Brind →     Image: Brind →       Image: Brind →     Image: Brind →     Image: Brind →     Image: Brind →
Project     Project     Cotation     Stations     AlternateStations     BiologicalHabitatIndex	<u>Project_ID</u> Project_Name	Project_vescription Project_Plan_App	roveo_indicator Project_Plan_Approval_Agency
Attribut     Attribut     BiologicalHabitatMetric     Result     Result     Result     Attribut     Attribut			
	1		
C:\Program Files\EarthSoft\EQuIS\For	mats\MTDEQ_WQX\MTDEQ_WQX.xse 1.0.21		EarthSoft, Inc.

If you didn't select a format after registering the application in Section 2.4, you probably won't see the MTDEQ\_WQX tab and you'll need to select a format now. To select the format follow steps 2-4 in Section 2.4. Once a format has been selected, EDP will remember the format and always open it when the application is started.

#### 3.1 EDP Main Window

The EDP main window contains all the tools you'll need to use to load, review, and update your EDD file.

Home	Ŧ				EQuIS Data Proce	sor				_ = ×
Format EDD	Error Summary Log Error Log	Comment	Rows 平 Pin Co ly III Colum s) View	n Chooser	Add New Row     Copy Row(s)     Set as Comment Row	Clear Re Jata	efresh Find	AZA Sort	Blank EDD EDD Description Cenerate Format File	Design Format File
Facility     Folicy     Fociet     Foci	tations abitatIndex abitatMetric ment ocuments	Project ID	Project_Name	Project_Des	ecription Project_P	an_Approved	I_Indicator	Project_P	Plan_Approval_Agency	
Reference Values	MTDEQ_WQX									

1) Home Menu

The home menu has options to:

- Open an EDD or format
- Save an EDD
- Sign & Submit
- Register the EDP application
- Exit the application

#### 2) Sections of the EDD Format

The left pane contains the sections of the EDD format. These correspond to the worksheets in the Excel version of the EDD. Once an EDD is loaded, clicking on each of these sections will bring up the associated data.

3) Tool Bar

The tool bar stretches across the EDP window and has options to:

- Open a Format, EDD, Error Log, or EDD Summary
- Turn comment rows off
- Select only rows with errors
- Turn column filters on
- Pin columns
- Choose which columns to show
- Add a new row to an EDD section
- Clear data from an entire table, an entire EDD, or an entire data package
- Refresh data in a selected row, table, or everything
- Find and replace text
- Sort columns ascending or descending
- Open a new blank EDD or open a description of the EDD

#### 4) Data

The main portion of the window is devoted to displaying the data associated with each section of the EDD. At the top of the data portion are column headers which have tool tips. To access these tool tips, simply hold your mouse over the column header name. The tool tips give a brief description of the field and include information about field length and whether a field is required, conditional, or optional.

#### 3.2 Loading EDD Files

1. Click the 'EDD' button in the tool bar.



2. Browse to the document to be loaded and select 'Open'.

Select Data File					? 🔀
Look jn:	🗀 Boulder-Elkhoi	n_MTWTRSHD_J.Clum	•	🗢 🗈 💣 🎟	
My Recent Documents Desktop My Documents	Received_12-12 M07TMDL01SAF	-2009 11_EDD.xls			
My Network Places	File <u>n</u> ame:			•	<u>O</u> pen
1,2003	Files of <u>type</u> :	All Files (*.*)		•	Cancel

3. EDP will load the file. Once the file is loaded the data can be displayed by selecting the sections in the left pane. Sections with errors will have red text and sections with no errors will be green.



#### 3.3 Error Logs

After an EDD has been loaded, EDP will produce an error log that can be saved as an HTML formatted file. EDP has two types of error logs: a detailed error log that lists details about each error, or an error summary that lists the type and count of each error in the EDD.

1. In the top tool bar, select 'Error Log' to save and view a detailed list of the errors in the current EDD. Use the Browse window to locate the desired location to save the file. After 'Save' is selected the error log will open.

	÷		
Home			
Y - ma	Ξ	🔽 📃 Comment Rows 🌱 Filter Column(s)	8
		🔲 💋 Errors Only 📮 Pin Column(s)	8
Format EDD	Log	Column Chooser	
Open	Error Log	View	

 Select 'Summary' to save and view a summary of all the errors in the current EDD. Use the Browse window to locate the desired location to save the file. After 'Save' is selected the error log will open.

2	pen								
Í		<b>- 1</b>	Ŧ						
		Home							
	Y.	inn inn		Σ		Comment Rows	Y	Filter Column(s)	8.0
	45-				0	Errors Only	耳	Pin Column(s)	8
	Forma	t EDD	Error Log	Summary				Column Chooser	Ξ
		Open	En	or Log		View	1		

#### **3.4 Correcting Errors**

As described in Section 1.0, the EDP application performs a series of formatting checks on the EDD and then identifies any records that have errors. The fields with errors will be shaded different colors depending on the type of error. A description of the error is provided when the cursor is placed over the field. In the example below, the Activity\_Type value in row 3 is not a valid value.

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Format EDD Error Summ Log Open Error Log	<b>o</b> ary		Comment Rows Errors Only View	Filter Column(s)  Fin Column(s)  Column Choose	er Set as Co	Row v(s) omment Row	Clear Data	Refresh
Facility						Ro	ws: 4 of 4	f [Comment
		Line	Activity_	Туре	Activity_G			
Stations		1	#Project_ID	Station_ID	Activity_ID	Activity_Type		Activity_Gro
AlternateStations		2	#Text(35)	Text(20)	Text(35)	Text(70)		Text(20)
BiologicalHabitatIndex	2	3	STREFPRO	K035VNTC01	99991-PHY-D1	ROUTINE	•	Ι
Activity		4	STREFPRO	K035VNTC01	99991-PHY-D2	QC-FR		
BiologicalHabitatMetric Results Dipersult Dipersult Dipersult AttachedDocuments						<u>Va</u>	alue not fo	ound in list

For most errors, there are two correction methods:

- Correct directly in EDP: To get the most out of the EDP application, DEQ recommends correcting errors directly within EDP. Click in the error field and type the correct value. If the field is restricted to a list of valid values, the valid values will be provided in a drop-down list by clicking on the down arrow located on the left side of the field. Once an error is corrected and the cursor is moved out of the field (i.e. user clicks on another field) the shading signifying an error should disappear. If you believe you have corrected an error but the field remains shaded, refresh the EDD by selecting 'Refresh Table' in the tool bar. Selecting refresh will run the formatting checks again.
- 2. **Correct in original EDD file:** Exit the EDP application and then open the EDD file. Correct the error in the EDD file, resave the EDD, and then re-load the EDD back into EDP to check for additional errors. This method is best if you're dealing with large EDD files that have many of the same errors (such as an incorrect valid value in 1,000 records).

*Note: If data providers believe that a new reference value is required, they should follow the process described in Section 3.1.2 of the 'MT-eWQX Guidance Manual' to request that the value be added.* 

#### 3.4.1 Using Find and Replace

The 'Find and Replace' function allows searching the EDD for specified values and then replacing those values with another value. This function is useful when there are a number of similar values that need to be changed. The 'Find and Replace' function is activated by selecting the binocular icon located in the Data section of the tool bar. The 'Find and Replace' dialog box will appear. Type the value to be replaced in the 'Find What' field and type the new value in the 'Replace With' field. Select 'Find' to view fields with the value and 'Replace' to replace the original value with the new value.

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	Open	Erro	Error Log View Data								

#### 3.4.2 Miscellaneous Tool Bar Features to Assist in Correcting Errors

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Forma	at EDD	Error Log	Summary		Column Chooser	Set as Comment Row	Clear •	Refresh	Find •	Sort •
	Open	En	ror Log	View Data						

There are several tool bar features to assist in correcting errors:

- In the View section of the tool bar:
  - <u>Comment Rows</u>: Check the box to show comment rows. Comment rows are non-data rows, typically the two header rows in each section of your EDD. In EDP, comment rows have orange text.
  - <u>Errors Only</u>: Check the box to show only rows with errors. This is very helpful when searching for records with errors, especially in larger EDDs.
  - <u>Filter Columns</u>: Select 'Filter Columns' to turn on the column filter feature. When on, the filter icon will appear next to each column name. To filter a column, select the filter icon and choose your desired filter option: All, Custom, Blanks, Non-blanks, or an individual column value.
  - <u>Pin Columns</u>: Select 'Pin Columns' to turn on the pin column feature. When on, the pin icon (a small push pin) appears next to each column name. To pin a column, click the pin icon next to the column to wish to not move. The pin icon will rotate down and the column will move in front of non-pinned columns.
  - <u>Column Chooser</u>: Select the Column Chooser to select which columns you wish to view. A dialog window will appear that allows you to turn on or off each column. Column configurations can also be saved and loaded.

- In the Data section of the tool bar
  - <u>Add New Row</u>: By selecting 'Add New Row', a blank row will be added to the bottom of the current EDD section you're viewing. This allows the user to enter data directly into the EDD via EDP, plus the format rules are applied as the data is entered.
  - <u>Set as Comment Row</u>: If a comment row appears as a data record, highlight the row and select 'Set as Comment Row'. In the Excel version of the EDD, comment rows are marked with a pound sign (#).
  - Find and Replace: See section 3.4.1
  - <u>Sort</u>: After selecting a column, select Sort to sort the records in ascending (A to Z, smallest to largest) or descending (Z to A, largest to smallest) order.

#### 3.5 Saving Changes to the EDD File

Changes made to the EDD directly in the EDP application are not automatically saved to the original EDD file that was loaded. To save the changes made:

1. Select Save  $\rightarrow$  EDD from the Home Menu.

0	<b>9</b> •	
2	Open	EDD
	Save	• ``
	Sign and Submit	
	<u>R</u> egister	
	Recent Files	•
		🚯 About 🔁 Options

 Browse to where you'd like to save the file. If you want to save the EDD as an Excel workbook with each section on a separate worksheet, select 'Excel Workbook' from the 'Save as type:' drop-down menu. Enter a file name and select 'Save'. Select 'Ok' when asked if you would like to proceed saving the file.



#### **3.6 Using EDP to Attach Documents**

Document can be associated with projects, stations, activities, and results. The AttachedDocuments worksheet is used to associate documents to projects, stations, or activities. The Result\_File\_Name field in the Result worksheet is used to associate documents to results. The Result\_File\_Name field and the fields in the AttachedDocuments worksheet can be filled out before the EDD is imported into EDP or they can filled out within EDP. With both methods, the following steps need to be completed in order for the Sign and Submit feature to work properly:

- 1. After the EDD has been loaded with no errors, go to the Result and/or AttachedDocuments sections that have documents.
- 2. Select the button in the File\_Name field of the Result and/or AttachedDocuments section. The button will not appear until the mouse hovers over the field.

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Home										¢	9			
Format EDD	Error Summ	ary	7 🗐 Cor 0 Derro 7 Filter Co	mment Rows 📮 F ors Only 🏢 o olumn(s)	Pin Column(s) Column Chooser	Add New Row       Image: Copy Row(s)       Image: Set as Comment	t Row	Refresh × Find × Sort ×						
Open	Error Log			view			Data		TOOIS		_			
			Rows: 4 or 4 [Comment Rows]											
		ht_Measu	ure_Unit	Statistic_Type	Weight_Basis	Dilution_Factor	Result_Comment	Result_File_Name						
Stations		_Measure	e_Unit	Statistic_Type	Weight_Basis	Dilution_Factor	Result_Comment	Result_File_	Name		٦			
AlternateS	itations			Text(20)	Text(15)	Numeric	Text(2000)	Text(255)			٦			
BiologicalH	abitatIndex							TEST_RESU	LT_9991-PHY-D	1.pdf				
Activity								TEST_RESU	LT_9991-PHY-D:	2.pdf	٦			
BiologicalH BiologicalH Results Comparison Result Comparison AttachedD	abitatMetric ment vocuments													

3. Browse to the document to be uploaded and select 'Open'.



4. If it was a document in the AttachedDocuments section, the File\_Extension and File\_Date fields will also be populated after the document is opened. Now the EDD is ready for the Sign and Submit feature.

#### 3.7 The Data Package

After an EDD has passed through the EDP with no errors, the data provider is ready to create the final data package. The data package is a single .zip file that consists of the EDD, any attached documents referenced in the EDD, and the data provider's user certificate. Once created, the data package is ready to be submitted to MT-eWQX as described in Section 5.4 of the MT-eWQX Guidance Manual.

#### 3.7.1 Sign and Submit

The easiest way to create the EDD data package is use the Sign and Submit feature in EDP.

- 1. Check the Result and AttachedDocuments sections of your EDD to verify if you have documents attached. If you <u>do not</u>, then continue with step 2. If you <u>do</u>, then see section 4.2.1 on how to use EDP to attach documents.
- 2. After all your EDD(s) have been loaded into EDP error-free and any documents have been attached per section 4.2.1, select 'Sign and Submit' from the main menu.



3. Enter your EQuIS Enterprise user name, password, and organization ID you're submitting data to. Select 'Save'.

Sign and Sub	mit 🖪 🔀
User Name:	jolene_mcquillan
Password:	****
Organization:	
🔲 Save Pass	word Save

4. EDP will generate a file name for your data package that includes the date, time, organization ID, and EDP format name. Browse to where you'd like to save the data package and select 'Save'. A confirmation window should appear verifying the EDD was signed and submitted.



5. The .zip file that was just created contains the EDD, your user certificate, and any attached documents if you attached them per section 4.2.1. If you have attached documents that were not attached per section 4.2.1, they'll need to be added to the .zip file separately.

To manually add attached documents: 1. Open the .zip file.

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Name 🔺				Туре	1	Modified			Size	
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AlternateS	tations.cs	v		Microsoft C	)f 1	0/21/2009	9 10:17	AM	101	
🐴 AttachedD	ocuments.	.csv		Microsoft C	)f 1	0/21/2009	9 10:17	AM	405	
🐴 Biological Ha	abitatInde	X.CSV		Microsoft C	)f 1	0/21/2009	9 10:17	AM	194	
🐴 Biological Ha	abitatMetr	ic.csv		Microsoft C	)f 1	0/21/2009	9 10:17	AM	192	
🖻 jolene_mcc	quillan.usr			USR File	1	0/21/2009	910:17	AM	59	
Project.csv	/			Microsoft C	)f 1	0/21/2009	9 10:17	AM	316	
🐴 Result.csv				Microsoft C	)f 1	0/21/2009	9 10:17	AM	3,855	
🖲 Stations.cs	W.			Microsoft C	)f 1	0/21/2009	9 10:17	AM	1,487	

2. Drag and drop your documents into the .zip file window. Select 'Add'.

Add	? 🔀					
File dropped: J:\WQX_Postmodern_ST	ORET\EQuIS\Training\BS\Test Activity.pdf					
Add to a <u>r</u> chive:						
esktop\20091021 1017.MTWTRSHI	D_WQX.MTDEQ_WQX.zip Cancel					
<u>N</u> ew	Upen <u>H</u> elp					
Action:	Options					
Add (and replace) files 🛛 👻	Encrypt added files					
<u>C</u> ompression:	Save full path info					
Normal 💌	Attributes					
Multiple <u>d</u> isk spanning:	Include only if archive attribute is set           Reset archive attribute					
(removable media only)	✓ Include system and hidden files					

3. Now your data package is ready to be submitted to MT-eWQX along with the External MTeWQX Submittal Form as discussed in Section 5 of the MT-eWQX Guidance Manual.

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<u>File Actions Options H</u> elp		
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	Exercise Enclype wow	chockoat mizara
Name 🔺	Type Modified	Size R
Activity.csv	Microsoft Of 10/21/2009 10:17 4	4M 1,897 7
🖳 AlternateStations.csv	Microsoft Of 10/21/2009 10:17 4	AM 101 4
AttachedDocuments.csv	Microsoft Of 10/21/2009 10:17 4	405 4
🖲 BiologicalHabitatIndex.csv	Microsoft Of 10/21/2009 10:17 /	AM 194 4
🖲 BiologicalHabitatMetric.csv	Microsoft Of 10/21/2009 10:17 /	AM 192 4
jolene_mcquillan.usr	USR File 10/21/2009 10:17 /	AM 59 1
Roject.csv	Microsoft Of 10/21/2009 10:17 /	AM 316 4
🖳 Result.csv	Microsoft Of 10/21/2009 10:17 /	AM 3,855 7
Stations.csv	Microsoft Of 10/21/2009 10:17 4	AM 1,487 6
Test Activity.pdf	Adobe Acro 10/19/2009 9:39 Af	M 7,542 6
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Selected 0 files, 0 bytes	Total 10 files, 16KB	00 "

## 4.0 EDP Updates

#### 4.1 Montana DEQ Format Updates

If DEQ makes changes to the Montana DEQ format, the EDP application will need to be updated with the new format files. DEQ does not plan to make frequent updates to the format, but occasionally DEQ may need to add or modify business rules or fields. If updates have been made to the format, a message will be sent through the MT-eWQX ListServ notifying users that an updated format file is available for download. Follow the steps in Section 2.2 of this manual to download and install the updated format files.

#### 4.2 Montana DEQ Reference Value Updates

New reference values are likely to be added multiple times a year. Sample Collection Method and Analytical Method are examples of two fields that commonly require updates. The reference value download will be updated a couple times a year. Users can also request an updated reference value file at any time from the MT-eWQX Data Manager. Follow the steps in Section 2.3 of this manual to download and install the updated reference value file.